

## Transferring Cases on the CARC Screen

### To Transfer (“CARC”) Cases Within or Between Counties:

- Only open cases can be transferred (however, see “To CARC Cases to Closed,” below).
- Cases are transferred from one caseload number to another, either within that service county or to another service county. The caseload number consists of a Worker Type code followed by the County, Unit, and Worker numbers (e.g., T 25 1 05).
- ‘J’ workers (WoRC Case Managers) can transfer cases only to another ‘J’ worker.
- Cases cannot be transferred to the J XX 1 01 worker, as there is no County Director for the WoRC Program.

Step	Action
1.	<ul style="list-style-type: none"> <li>• Refer to Case Transfer procedures in the policy manual to ensure that all policy requirements are met before transferring cases on TEAMS. (Remember, people who work for the same county director or WoRC program manager/supervisor may work each other’s cases; there’s no need to transfer such cases.)</li> </ul>
2.	‘Next’ to the <b>CARC</b> (Case Record Control) screen.
3.	<p>On CARC, enter the sending caseload number in the “From Caseload No.” field. Then enter the appropriate caseload in the “To Caseload No.” field as follows:</p> <ul style="list-style-type: none"> <li>• To transfer cases to <b>another county</b>, enter the Worker Type code (‘T’ or ‘J’), the administrative County number for the new county, <b>9</b> for the Unit, and <b>99</b> for the worker number. <ul style="list-style-type: none"> <li>○ EXPD and EMPS will be deauthorized. An alert will be set for the other Worker Type (the ‘T’ or ‘J’ worker). <ul style="list-style-type: none"> <li>– If the transfer takes place the 1<sup>st</sup> through the 15<sup>th</sup> of a month, all authorized EXPD and EMPS screens after the current calendar month will be deauthorized.</li> <li>– If the transfer takes place after the 15<sup>th</sup> of a month, the EXPD and EMPS screens for the next month remain authorized, but future months will be deauthorized.</li> </ul> </li> </ul> </li> <li>• To transfer cases to another worker <b>within your county</b> (or county combination), simply enter the other worker’s caseload number.</li> <li>• Note: Supervisors and County Directors can transfer cases <b>within their jurisdiction</b> directly to another worker within their jurisdiction; simply enter the other worker’s caseload number.</li> </ul>
4.	<p>Tab to the “Case No.” fields and enter all cases to be transferred to that worker or county. When finished, press Enter.</p> <ul style="list-style-type: none"> <li>• Once cases are transferred to another county, the first county can no longer work them.</li> <li>• The person assigned to check referrals on the RELI screen will see a referral for each case that was transferred, and will assign the cases. When cases are assigned, the receiving worker will receive an alert.</li> </ul>

**To “CARC” Cases to Closed:**

- All service counties have a caseload number set aside strictly for closed cases. This prevents workers from having a mix of open and closed cases within their caseloads.

Step	Action
1.	Close the case as appropriate by entering a Denial/Closure code on the Eligibility Determination screen(s). <ul style="list-style-type: none"> <li>• Cases must be “rolled” to the next month in order to be closed effective the last day of the last month of benefits.</li> </ul>
2.	‘Next’ to the CARC screen.
3.	On <b>CARC</b> , enter the sending caseload number in the “From Caseload No.” field. Then tab to the “To Caseload No.” field and enter the “closed” caseload number for your county (if applicable): <ul style="list-style-type: none"> <li>• The Unit and Worker numbers (the last 3 digits) will be <b>9 98</b>.</li> </ul>
4.	Enter the case number in the center section of the screen. Press Enter to complete the transfer.
5.	Send appropriate notices, enter case notes as needed, and take appropriate action on the case file as required per policy.
Note: If the case is reopened later, it will then need to be “CARC’d” from the closed caseload number back to the appropriate caseload number.	